Direct Certification

Private School Upload Process

The direct certification contact will enter the Direct Certification Web Application site by logging in with the assigned User ID and password. The first page to display will be the *Confidentiality Acknowledgement* page as shown below.

A user will enable the application once the confidentiality terms are accepted by pressing the **Accept** button.

Upload - A new tab has been added to the tab bar on the top of the page labeled **Upload**. Private schools will select this tab to begin the process of uploading the school's student enrollment information.
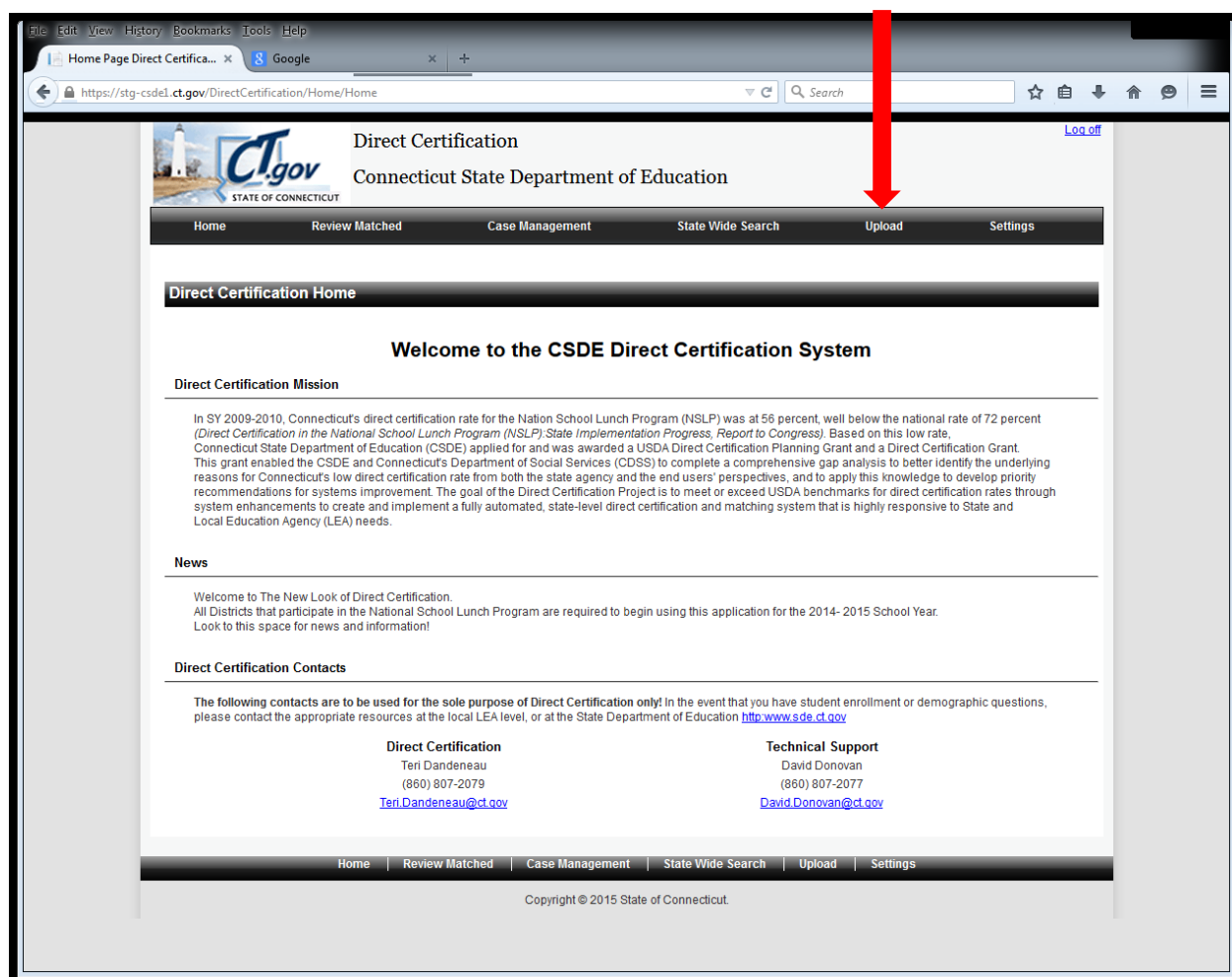
The private school user will see the *Student Information File Upload* page displayed.
The first thing the user must do is click on "here" to download the *Private School Enrollment Template*. This template is to be used to upload the school's enrollment data to be matched against the Department of Social Services (DSS) client list to determine if the student is automatically eligible for free meal/milk benefits.

Important: This is the only file layout that will work with the matching process. Data must be saved in a CSV format, with the extension **.csv**. (Note that "CSV" stands for Comma Separated Variable.)
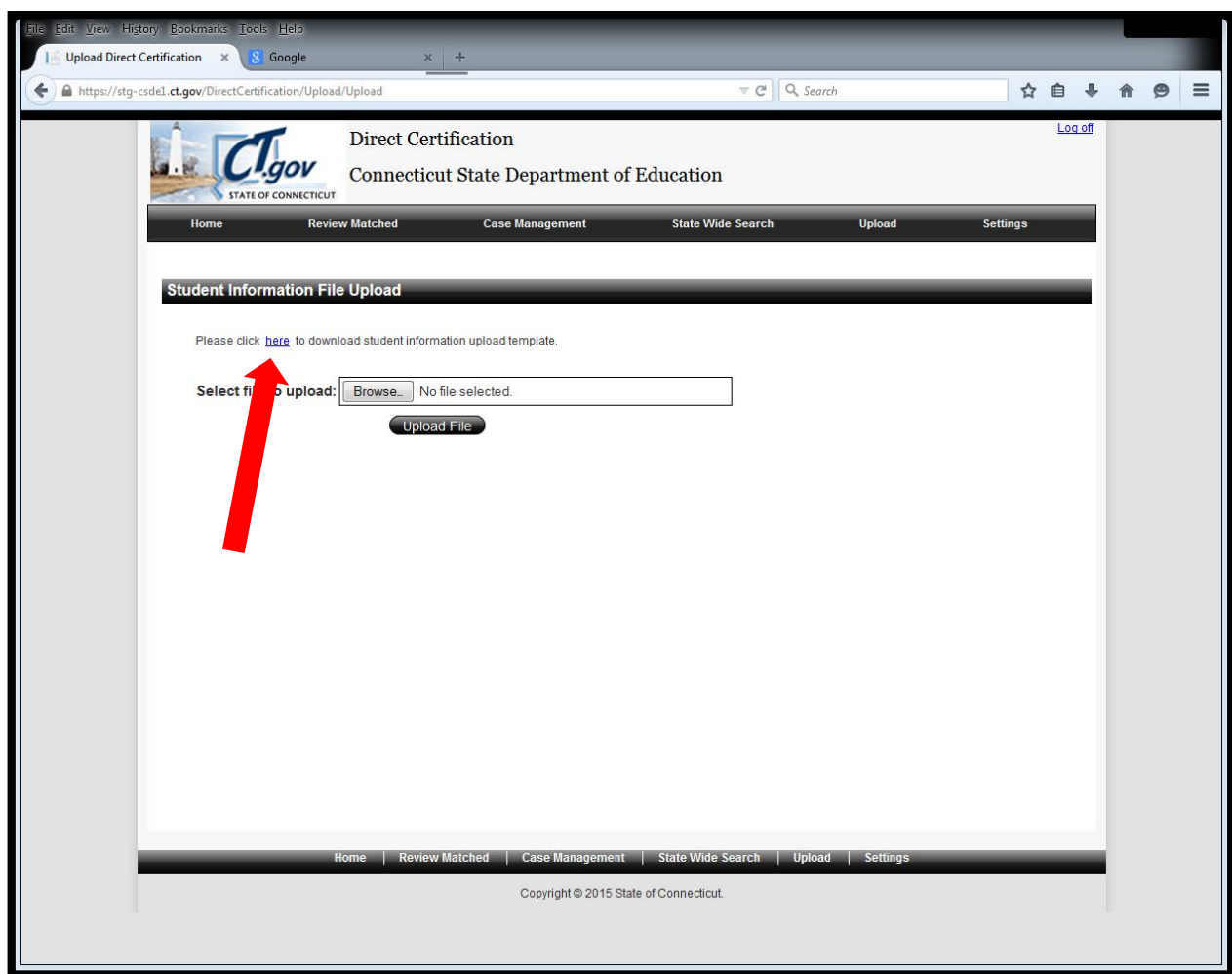
For ease of use, the template will look like an Excel spreadsheet:
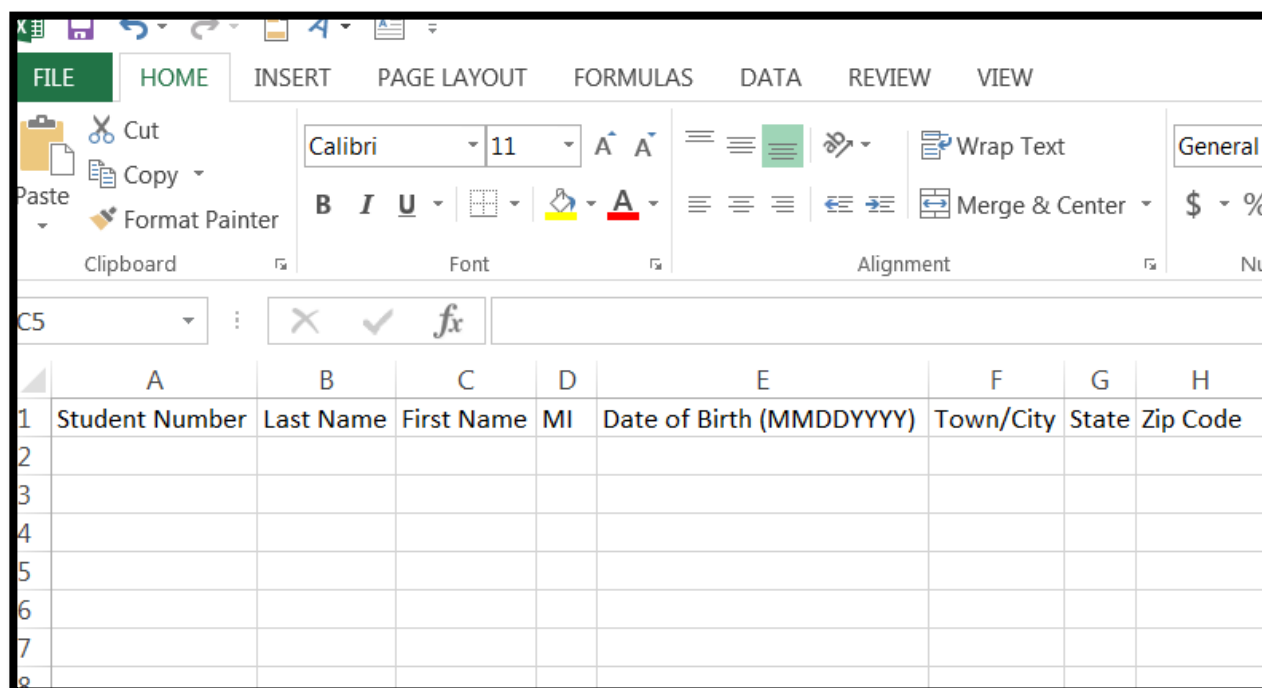
Certain fields are required, while others are optional. For example, a student identifying number must be assigned to each student and must be unique to each student enrolled in the school. If the students do not have a number, a sequential number can be assigned for each student (e.g., 12345, or 02468).

In summary, note the required fields outlined below:

FIELD	REQUIRED
STUDENT NUMBER	YES
LAST NAME	YES
FIRST NAME	YES
MIDDLE INITIAL	NO (OPTIONAL)
DATE OF BIRTH	YES
TOWN/CITY	NO (OPTIONAL)
STATE	NO (OPTIONAL)
ZIP CODE	NO (OPTIONAL)

Additionally, please note the following:

- Student number allows for up to 10 characters maximum.

- Full student names must be entered into the spreadsheet.

- Do not use nicknames or shorter versions of names.

- Date of birth must be in the MMDDYYYY format (e.g., 02042008). Note that the leading zero will not appear when entering the date. For example, 02152004 will appear as 2152004. Do not use dashes, hyphens or slashes between the numbers.

- When the data is completely entered into the file, the file **MUST be saved as a CSV file**, with the extension of .csv. (Note that it will default to this extension when using the template). In addition, the Upload template appears as an Excel Program Spreadsheet for Schools to enter enrollment data. However, when saved as a CSV file, an information message may appear indicating that some Excel functions may be lost. Press the "Save" button since the Excel function is not used in the CSV file.

Once the file is completed and saved, the user can then process the upload of the file. The user will have the option of entering the name of the saved file, or pressing the **Browse** button to search the directories for the location of the saved file.

Once the file is selected, press the **Upload File** button. The match process will now begin. If there are errors in the file, a message will display with the line number and error description. The Upload File process will begin again once the errors are corrected.
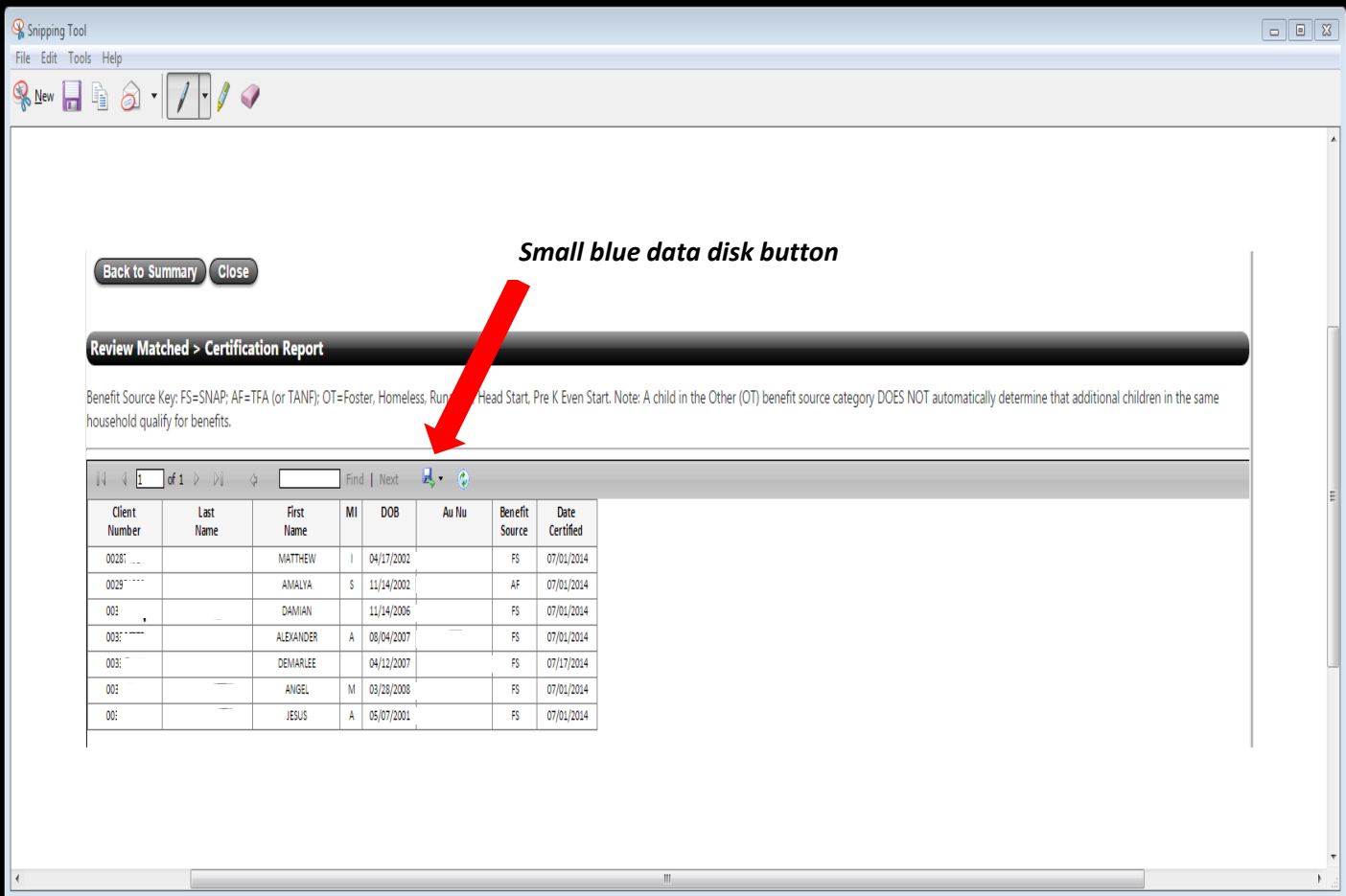
Once completed, the user will receive a "Successful upload" message on the screen as shown below.
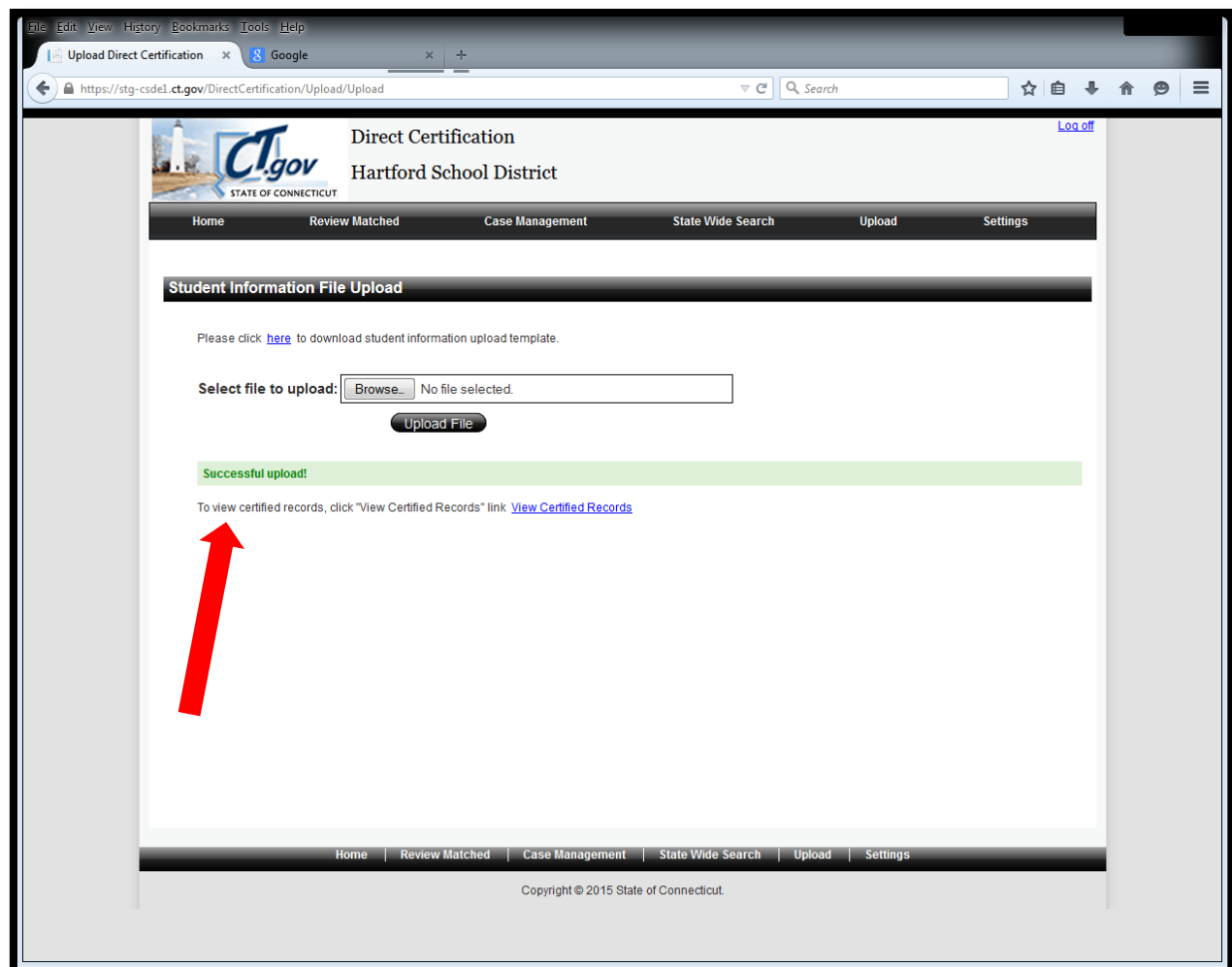
Once there is a successful match process, the matched report will be displayed on the screen. To download the report, select the small blue data disk button on the report header. Multiple options will be available to save the report (i.e., Excel, CSV, XML, Word, etc.)

Important: The CT State Department of Education (CSDE) **does not** store private school data. ==The private schools are responsible for saving this data for future reporting requirements and for audit purposes.==

IMPORTANT POINTS TO REMEMBER

❑ The user must use the **.csv template** when uploading files.

❑ The user can repeat the upload process multiple times.

❑ The user must <u>save</u> the file in the format of their choice in order to keep the results. The CSDE does not save the matched data for private schools.

❑ To validate an individual student, it is recommended that the State Wide Search function be used. If a match is found, save a copy of the screen as evidence for future reporting/auditing.

❑ If the user has a student that <u>did not match</u> on the report and the school believes the student should have matched, the direct certification contact person should use the **State Wide Search**. This allows for partial name searches. It is possible that the DSS client list and the school enrollment name and/or Date of Birth can be recorded differently for a student.

❑ Refer to the USDA *Eligibility Manual for School Meals* for questions regarding direct certification and eligibility.